

# F&B industry brief overview

Almaty 2021 Q3



F&B stock: 3,200

Population: 2,012,614\*

Average wage: 283,700 KZT\*

## Cushman & Wakefield Kazakhstan study of the F&B market

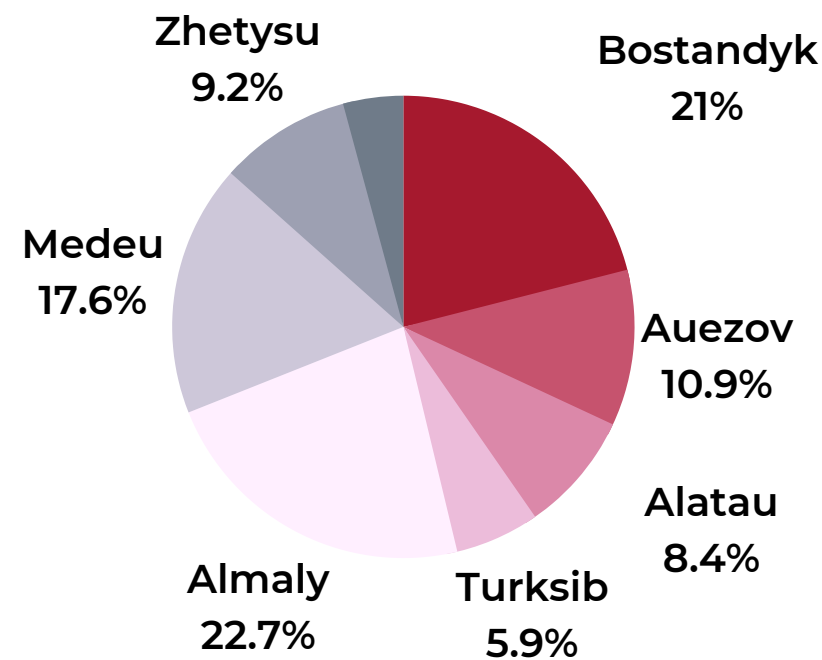
There are around 3,200 F&B units in the City, that provide a variety of services. There is a variety of different forms of facilities: tea clubs, fast food, coffee shops, ready meals, pizzerias, canteens, sushi bars, and more. Quick service restaurants are the largest category of F&B units in Almaty. Canteens are another F&B format that has been gaining traction over the past few years. This is followed by cafes and pubs, reflecting the lifestyle choices made by local consumers.

Most cafes & restaurants are located in Medeu, Bostandyk, and Almaly districts, cumulatively accounting for 60% of the market in Almaty. However, the districts with the largest populations do not always have the largest quantity of units. Auezov, Alatau, and Tuksib are all densely populated districts, yet possess a very little number of food outlets. The chart to the left illustrates the share of stock of F&B units by district.

The F&B facilities in the city can be separated into 4 main categories:

1. QSR: a specific type of restaurant that serves fast food and has minimal table service
2. Casual Dining: Family-Friendly restaurants that provide table service
3. Delivery: Takeout F&B amenities with no seats
4. Pubs & bars: Often serve food and are licensed to sell alcohol

\*Source: Department of the Statistics of Kazakhstan



F&B stock by District

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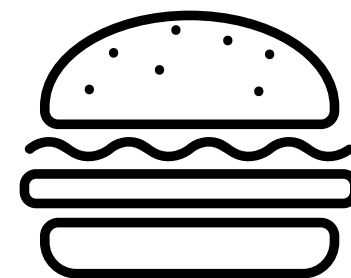
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As illustrated in the pie chart to the left, there is a strong concentration of F&B outlets in the Almaty district of the city. This is due to the nature of the district, which is relatively small in size as compared to other districts. Moreover, it covers the historical city center, which is a popular pedestrian zone and a high-footfall area, making the district highly attractive for various types of F&B outlets.

### Average prices for our food selection:

Burger  
2.2\* USD



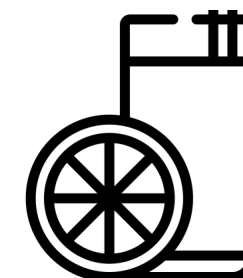
Cesar  
5.81 USD



Latte  
2.1 USD



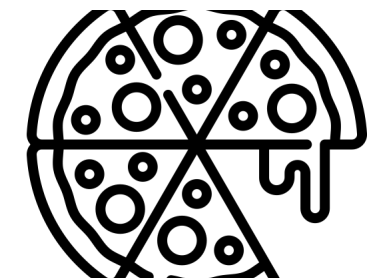
Lemonade  
2.52 USD



Lagman  
3.23 USD

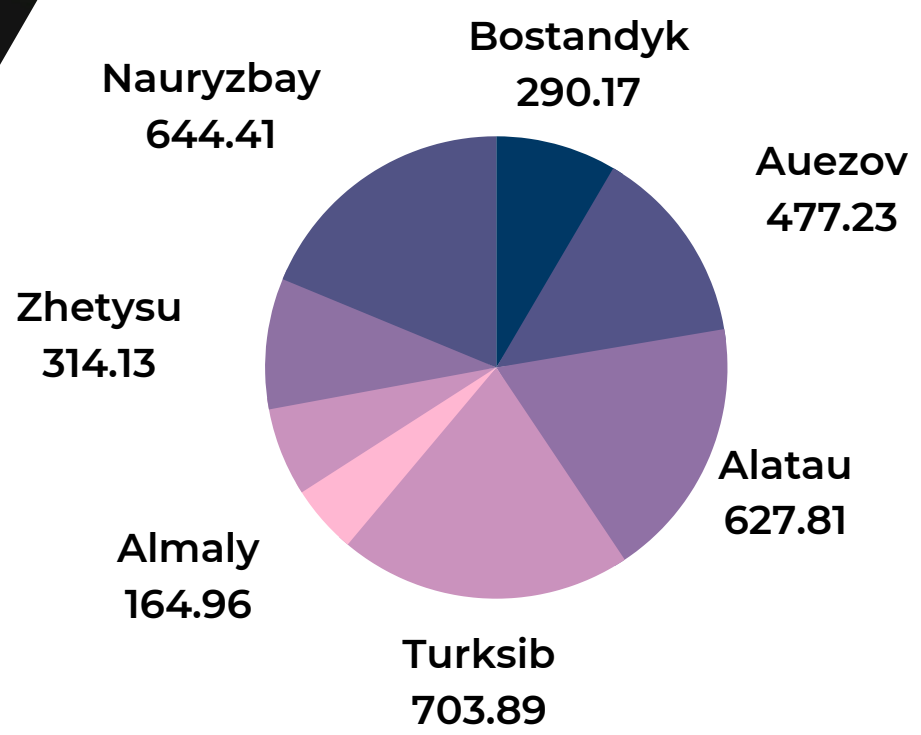


Margarita  
5.15 USD



Lemonade prices are for 400 ml and latte prices are for 350 ml.

\*The calculations of prices are made based on the average KZT/USD rate of 425.73 provided by the National Bank of the Republic of Kazakhstan for Q3 of 2021



Population per F&B unit



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F&B locations have adapted to COVID-19 restrictions by opening food-trucks and other outdoor food facilities around the city, in order to stay open if indoor retail will be closed.

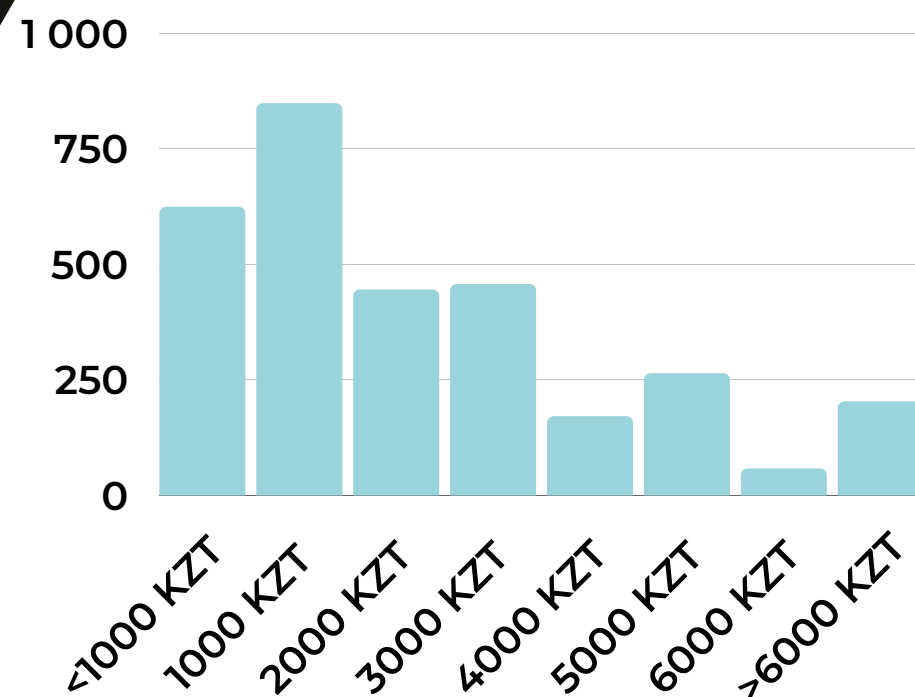
There are 16 well-known chains (local and global franchises) that represent 13% of all F&B units in the city and dominate the market. Most known are ABR, Bahandi, Salam Bro, KFC, McDonalds, etc. Burger units are even more concentrated based on the fact that 50% of the units are operated by fast-food chains.

Average bill accounts to 1,000-2,000 KZT per person targeting low to mid-income population. Central districts witness an average bill of 3,000 KZT and higher per person.

Food delivery services are dominated by Glovo, Wolt, Yandex Food, and Chocofood.

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F&B units by average bill